

## 8 Organizational Reports

The *Organizational Reports* section (Figure 1) of Research Administration is available to the users who have Organizational Reports permission and provides the means to view the following reports:

- Recent Proposals
- Documents Not Electronically Signed
- Active Awards
- Final Project Reports
- Continuing Grant Increments
- Organization Permissions Reports

Complete the following steps to view:

1. Use the current organization name displayed or select from the list of available organizations in the drop down list box.
2. Click on the type of report under Indicate Report Type (circled in Figure 1).
3. Click **Continue** to generate the report.



The screenshot displays the 'Organizational Reports' main page. At the top, there is a navigation bar with the 'FastLane' logo and links for 'NSF Home', 'News', 'Site Map', 'GPG', 'GPM', 'Send Comments', 'FastLane Help', 'Return to Org List', and 'Logout'. Below this, the page title is 'Organizational Reports | MAIN' and the institution is identified as 'Rensselaer Polytechnic Institute'. The main content area features a 'Select Organization Name' dropdown menu currently showing 'Rensselaer Polytechnic Institute'. Underneath, the 'Indicate Report Type' section is highlighted with a red circle and contains six radio button options: 'Recent Proposals' (selected), 'Documents Not Electronically Signed', 'Active Awards', 'Final Project Reports', 'Continuing Grant Increments', and 'Organization Permissions Report'. A 'Continue' button is positioned at the bottom of the form.

Figure 1. Organizational Reports Main

## Recent Proposals

The *Recent Proposals Page* (Figure 2) appears when the Recent Proposals radio button is selected from the *Organizational Reports Main Screen* (Figure 1). The page allows the user to search for a proposal. A search can be conducted using:

- Status
- Date of most recent status change
- Proposal number
- PI's last name

Complete the following actions for a search:

1. Select the different types of status radio buttons (circled in Figure 2) such as:
  - Pending
  - Recommended for funding
  - Declined
  - All.

The screenshot shows a web interface for searching recent proposals. At the top, it says 'Organizational Reports | MAIN' and 'Institution: Rensselaer Polytechnic Institute'. Below that, the page is titled 'Recent Proposals'. The main heading is 'Search for Recent Proposals by any of the following:'. There are four search criteria: 'Status' with radio buttons for 'Pending', 'Recommended for funding', 'Declined', and 'All' (which is selected); 'Date of most recent status change' with a text input field and a calendar icon; 'Proposal Number' with a text input field; and 'PI's Last Name' with a text input field. Below the search criteria, there is a 'Sort results by:' section with radio buttons for 'Status', 'Proposal Number' (selected), 'PI's Last Name', and 'Performing Organization'. At the bottom, there is a 'Continue' button. The browser's address bar shows 'Internet'.

Figure 2. Recent Proposals Page

2. Click on the corresponding radio button.

3. Steps 4, 5 and 6 are optional.
4. Enter in **Date of most recent status change** or use the calendar feature to select a date.
5. Enter in **Proposal Number**
6. Enter in **PI's Last Name**.
7. Sort results by clicking on one radio button:
  - Status
  - Proposal Number
  - PI's Last Name
  - Performing Organization
8. Click **Continue** to generate the report.

## Recent Proposals Search Results

Recent Proposal Search Results List Page (Figure 3) will appear. It lists all proposals that contain the selection criteria you made in the Recent Proposals Page (Figure 2). The list contains:

- PI name
- Performing Organization
- Division
- Status of a Proposal
- Status Date
- Requested Amount
- Program Officer

**Organizational Reports** | MAIN ▶ Institution: Rensselaer Polytechnic Institute

**Recent Proposals Search Results**

Click on "Proposal Number" to view detailed Proposal information. Sort results by clicking column titles.

192 Proposals found, displaying 1 to 10 [< Previous 10] 1, 2, 3, 4, 5, 6, 7, 8, 9, 10 [Next 10 >]

Division	Proposal Number	PI Name	Performing Organization	Status	Status Date	Requested Amount	Program Officer
DIVISION OF HUMAN RESOURCE DEVELOPMENT	<a href="#">0076688</a>	Nagy, George	Rensselaer Polytech Inst	Pending	10/06/2003	\$1,588,995.00	Victor A. Santiago
DIV OF ELECTRICAL AND COMMUNICATIONS SYS	<a href="#">0097452</a>	Zhang, Xi-Cheng	Rensselaer Polytech Inst	Withdrawn	11/22/2002	\$600,000.00	James Momoh
DIV OF CIVIL AND MECHANICAL SYSTEMS	<a href="#">0218716</a>	Schadler, Linda	Rensselaer Polytech Inst	Awarded	12/03/2002	\$123,891.00	Jorn Larsen-Basse
DIV OF CHEMICAL AND TRANSPORT SYSTEMS	<a href="#">0221553</a>	Rusak, Zvi	Rensselaer Polytech Inst	Declined	11/18/2002	\$326,806.00	Farley Fisher
DIV OF CHEMICAL AND TRANSPORT SYSTEMS	<a href="#">0222526</a>	Altwickler, Elmar	Rensselaer Polytech Inst	Declined	11/18/2002	\$197,112.00	Farley Fisher
DIVISION OF EARTH SCIENCES	<a href="#">0229424</a>	Roecker, Steven	Rensselaer Polytech Inst	Declined	11/19/2002	\$884,147.00	Robin Reichlin
DIVISION OF EARTH SCIENCES	<a href="#">0230054</a>	McCaffrey, Robert	Rensselaer Polytech Inst	Awarded	12/04/2002	\$165,721.00	David Fountain
DIVISION OF UNDERGRADUATE EDUCATION	<a href="#">0231259</a>	Holmes, Mark	Rensselaer Polytech Inst	Declined	11/22/2002	\$70,746.00	Ernest L. McDuffie
DIVISION OF MATERIALS RESEARCH	<a href="#">0231291</a>	Rajan, Krishna	Rensselaer Polytech Inst	Awarded	01/02/2003	\$4,822,660.00	Carmen I. Huber
DIVISION OF UNDERGRADUATE EDUCATION	<a href="#">0231298</a>	Millard, Don	Rensselaer Polytech Inst	Declined	01/22/2003	\$500,000.00	Roger E. Salters

Transfer Data to: [Excel](#)

Internet

Figure 3. Recent Proposals Search Results List

Complete the following steps:

1. Sort any of these categories by clicking on the column title.

2. Click on a proposal number (circled in Figure 3) to view detailed information on a proposal. A *Detailed Proposal Information Screen* will appear (Figure 4).

The screenshot shows the 'Detailed Proposal Information' screen within the FastLane Research Administration interface. At the top, there is a navigation bar with the FastLane logo and links for 'NSF Home', 'News', 'Site Map', 'GPG', 'GPM', 'Send Comments', and 'FastLane'. Below this is a header for 'Organizational Reports | MAIN'. The main content area is titled 'Proposal Information' and contains the following details:

<b>PROPOSAL</b>	
Proposal Number:	0071482
Proposal Title:	Algebraic Topology
Received on:	10/25/99
Principal Investigator:	Randy McCarthy
Organization:	U of Ill Urbana-Champaign <i>This Proposal has NOT been Electronically Signed by the Authorized Organizational Representative (ADR).</i>
<b>PROGRAM</b>	
NSF Division:	DIVISION OF MATHEMATICAL SCIEN
Program Name:	TOPOLOGY
Program Officer:	Benjamin M. Mann
Telephone:	(703) 306-1886
Email:	bmann@nsf.gov
<b>PROPOSAL STATUS</b>	
Status As of Today Dated:	08/21/03

At the bottom center of the screen, there is a 'Cancel' button.

Figure 4. Detailed Proposal Information

3. Click **Cancel** to return to the Recent Proposal Information Screen (Figure 3).

## Documents Not Electronically Signed

Selecting *Documents Not Electronically Signed* from the *Organizational Reports Main Screen* (Figure 1) will display a *Documents that are Not Electronically Signed Intro Screen* (Figure 5). If a proposal is submitted without AOR permission, the AOR has five business days from the date of electronic submission to electronically sign the proposal.

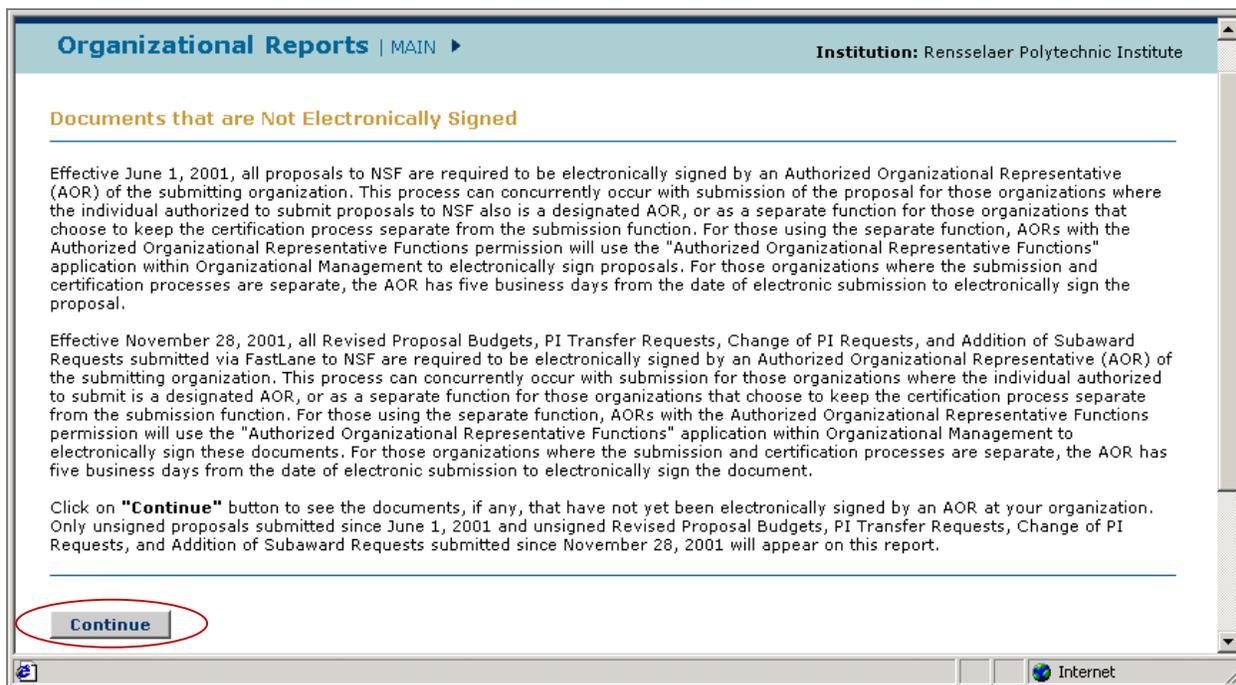


Figure 5. Documents that are Not Electronically Signed intro screen

Complete the following steps:

1. Click **Continue** to see the documents that are not electronically signed by an AOR. Only unsigned proposals and unsigned Revised Proposal Budgets, PI Transfer Requests, Change of PI Requests, Cost Sharing Notifications and Addition of SubAward Requests will appear on this report.
2. The *Documents Not Electronically Signed List Page* (Figure 6) displays all the documents that are pending an e-Signature from an AOR. The list displays:
  - Document Type
  - Proposal/Award Number
  - Principal Investigator
  - Title
  - Submission Date
3. Click on the column title to sort any of these options.



Figure 6. Documents Not Electronically Signed

4. A listing of the AOR's who have the permission to sign the documents can be viewed by clicking on the **View AOR's who have permissions to sign** link on the *Documents Not Electronically Signed* List Page (Figure 6). A *Listing of AORs who have permission to sign the documents* screen (Figure 7) will appear. Click **Cancel** to go back to Figure 6.



Figure 7. Listing of AOR's who have permission to sign the documents

5. Click on the specific Proposal/Award number (circled in Figure 5) to view the document. A *Detailed Proposal Information Screen* will appear (Figure 4).

Or



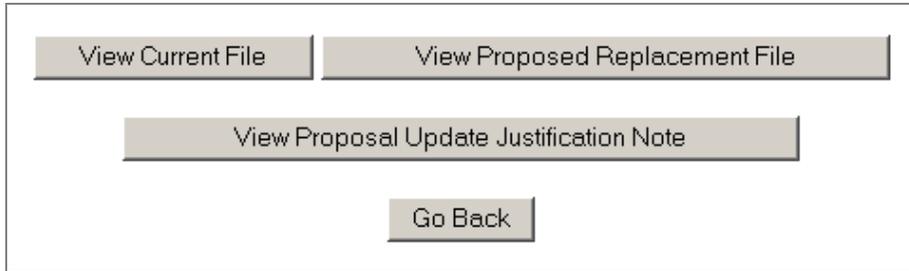


Figure 9. Update Summary Log options

**NOTE:** If the statement “No sections have been assigned changes” (circled in Figure 8) appears instead of the Update Summary Log Options (Figure 9), click **Go Back**.

7. To view a submitted proposal, click on the Proposal/Award number of a *Proposed/Supplement* document type (not shown) on the *Documents Not Electronically Signed Screen* (Figure 6).
8. The *View Submitted Proposal Screen* (Figure 10) will appear. Components of the Proposal can be selected by clicking on the corresponding **GO**. Click on **Go Back** to return to Figure 6.

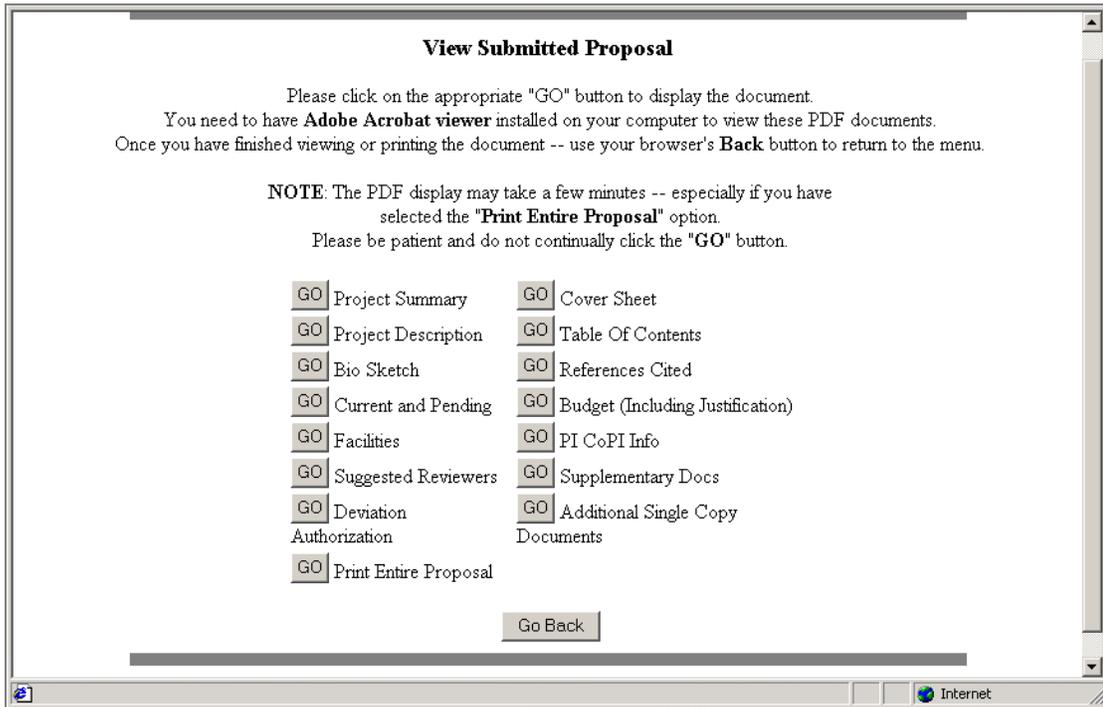


Figure 10. View Submitted Proposal

## Active Awards

The *Active Awards* page (Figure 11) appears when the Active Awards radio button is selected from the *Organizational Reports Main Screen* (Figure 1). This page provides a search that allows the user to view an Award document. Complete the following steps:

1. Awards can be retrieved by any one of the following conditions:
  - Award date
  - Award number
  - Date of most recent status change.
2. The results can then be sorted using one of the following options:
  - Performing Organization
  - Award Expiration Date
  - Award Number.
3. Click **Continue** after you select the options.

Organizational Reports | MAIN ▶ Institution: Rensselaer Polytechnic Institute

Active Awards

Search for Awards by any of the following:

Award Date:

Award Number:  (7 Numbers)

Date of most recent status change:

Sort results by:

Performing Organization

Award Expiration Date

Award Number

Internet

Figure 11. Active Awards screen

## Active Awards Search Results

The *Active Awards Search Results List Screen* (Figure 12) will appear and display all Awards that meet the search criteria.

**Organizational Reports** | MAIN ▶ Institution: Rensselaer Polytechnic Institute

**Active Awards Search Results**

Click on "Award Number" to view Award Abstract. Sort results by clicking column title.

88 Awards found, displaying 1 to 10 [< Previous 10] 1, 2, 3, 4, 5, 6, 7, 8, 9 [Next 10 >]

Award Number	PI Name	Performing Organization	Total Award Amount	Expiration Date	Final Project Report Due Date
<a href="#">0073769</a>	McCaffrey, Robert	Rensselaer Polytech Inst	\$210,000.00	06/30/2004	09/28/2004
<a href="#">0073912</a>	Abrajano, Teofilo	Rensselaer Polytech Inst	\$234,994.00	12/31/2003	03/30/2004
<a href="#">0074273</a>	Kablinski, Pawel	Rensselaer Polytech Inst	\$240,000.00	07/31/2004	10/29/2004
<a href="#">0076281</a>	Ferris, James	Rensselaer Polytech Inst	\$305,780.00	06/30/2004	09/28/2004
<a href="#">0077837</a>	Bedard, Donna	Rensselaer Polytech Inst	\$332,231.00	08/31/2004	11/29/2004
<a href="#">0079436</a>	Cramer, Steven	Rensselaer Polytech Inst	\$691,710.00	12/31/2003	03/30/2004
<a href="#">0086555</a>	Dobry, Ricardo	Rensselaer Polytech Inst	\$2,683,437.00	09/30/2004	12/29/2004
<a href="#">0089399</a>	Wagner, Doris	Rensselaer Polytech Inst	\$155,000.00	06/30/2004	09/28/2004
<a href="#">0091892</a>	Apple, Thomas	Rensselaer Polytech Inst	\$157,282.00	03/31/2004	06/29/2004
<a href="#">0093191</a>	Nyman, Marianne	Rensselaer Polytech Inst	\$235,000.00	02/29/2004	05/29/2004

Transfer Data to: [Excel](#)

Internet

Figure 12. Active Awards Search Results List

Complete the following steps:

1. The search list will display:
  - PI name
  - Performing Organization
  - Total Award Amount
  - Expiration Date
  - Final Project Report Due Date.
2. Sorted by any of these categories by clicking on the column title.
3. Click on the award number (circled in Figure 12) to view the Award Abstract.
4. The Award Abstract (Figure 13) will appear. The Award Abstract provides a brief description and details of the award.



**NSF Award Abstract - #8514743**

**A Handbook on the Methodology of Policy Analysis**

**NSF Org** PRA  
**Latest Amendment Date** April 14, 1987  
**Award Number** 8514743  
**Award Instrument** Standard Grant  
**Program Manager** OPA OFFICE OF PLANNING AND ASSESSMENT  
O/D OFFICE OF THE DIRECTOR  
**Start Date** August 1, 1985  
**Expires** June 30, 1988 (Estimated)  
**Expected Total Amount** \$129935 (Estimated)  
**Investigator** Otto A. Davis (Principal Investigator current)  
**Sponsor** Carnegie Mellon University

Figure 13. Award Abstract

## Final Project Reports

The *Final Project Reports* page (Figure 14) appears when the Final Project Reports radio button is selected from the *Organizational Reports Main Screen* (Figure 1). The Final Project Reports page prompts a search that allows the user to view the status of a Final Project document.

Complete the following steps:

1. Final Project Reports can be sorted by using any one of the following conditions (circled in Figure 14):
  - Overdue
  - Due within 30 days
  - Due in 31-90 days
  - All

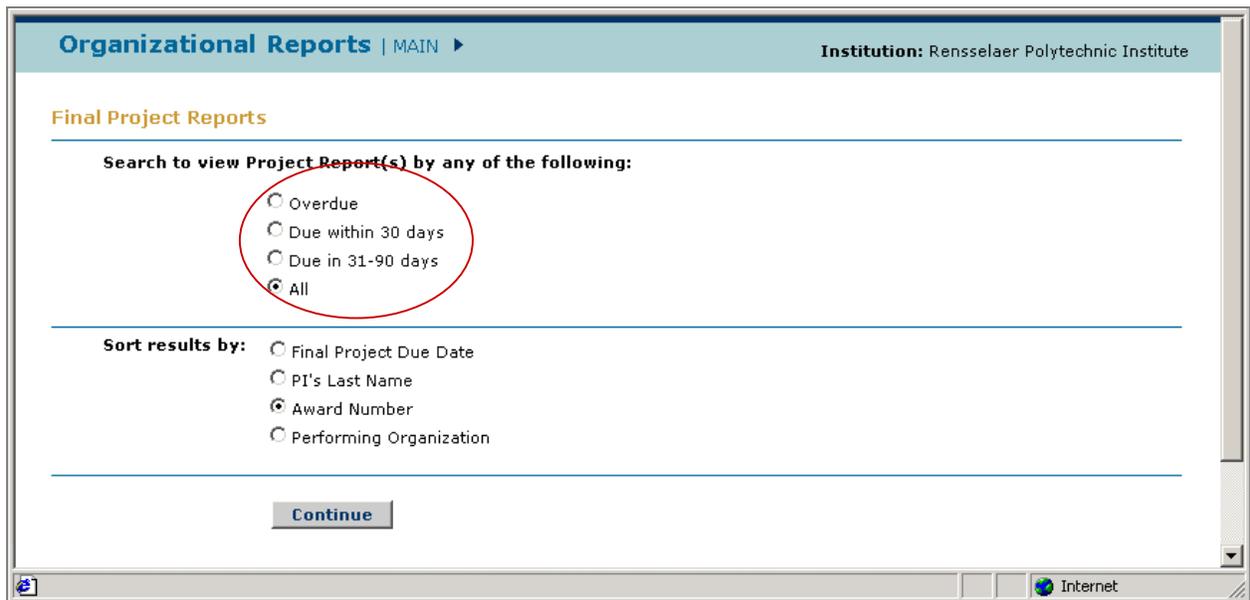


Figure 14. Final Project Reports

2. Sort results clicking on of the radio buttons:
  - Final Project Due Date
  - PI's Last Name
  - Award Number
  - Performing Organization.
3. Click **Continue** to generate the report.

## Final Project Reports Search Results

The Final Project Reports Search Results Page (Figure 15) will appear. The search results will display all Awards that meet the options you selected. Complete the following steps:

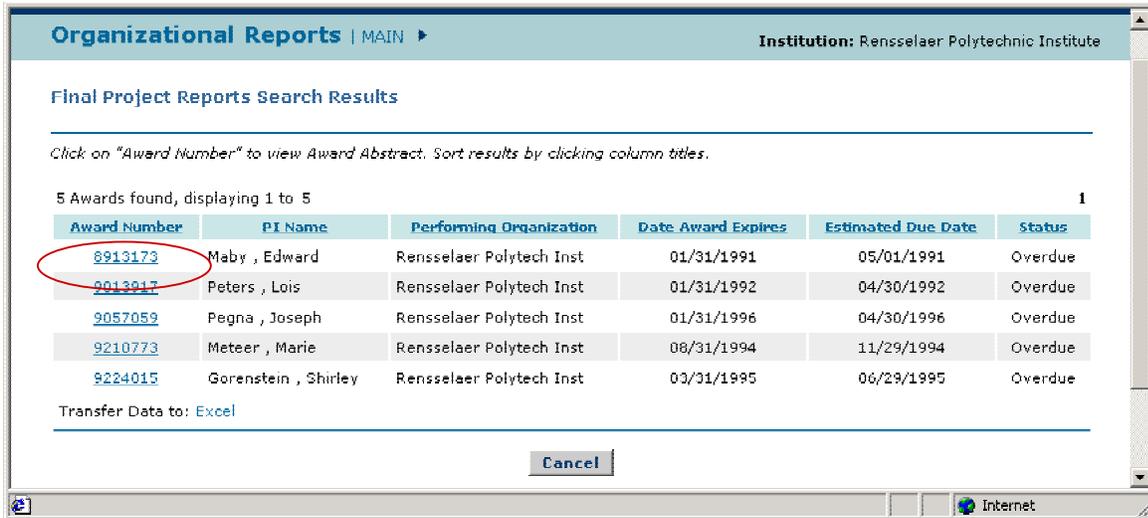


Figure 15. Final Project Reports Search Results

1. The list displays:
  - PI name
  - Performing Organization
  - Date Award Expires
  - Estimated Due Date
  - Status
2. Sort any of these categories by clicking on the column title.
3. Click on the award number (circled in Figure 15) to view the Award Abstract.
4. The Award Abstract (Figure 16) will appear.



**NSF Award Abstract - #8514743**

**A Handbook on the Methodology of Policy Analysis**

**NSF Org** PRA  
**Latest Amendment Date** April 14, 1987  
**Award Number** 8514743  
**Award Instrument** Standard Grant  
**Program Manager**  
OPA OFFICE OF PLANNING AND ASSESSMENT  
O/D OFFICE OF THE DIRECTOR  
**Start Date** August 1, 1985  
**Expires** June 30, 1988 (Estimated)  
**Expected Total Amount** \$129935 (Estimated)  
**Investigator** Otto A. Davis (Principal Investigator current)  
**Sponsor** Carnegie Mellon University

Figure 16. Award Abstract

5. Click **Cancel** to Return to Figure 15.

## Continuing Grant Increments

The *Continuing Grants Increments* page (Figure 17) appears when the Continuing Grants Increments radio button is selected from the *Organizational Reports Main Screen* (Figure 1). The Continuing Grant Increments page provides a search that allows the user to view the status of a CGI.

Complete the following steps:

1. Use the key fiscal year function located in a drop down menu (circled in Figure 17).
2. Sort results using one of the following options:
  - Final Project Due Date
  - PI's Last Name
  - Award Number
  - Performing Organization.
3. Click **Continue** to generate the report.

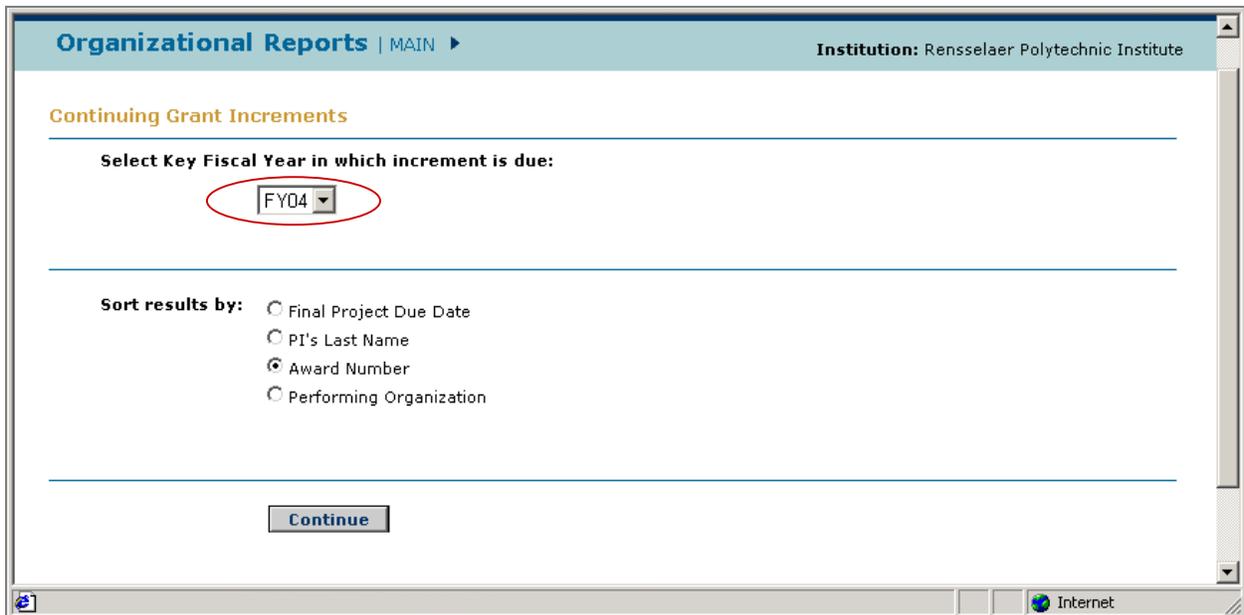


Figure 17. Continuing Grant Increments

## Continuing Grant Increments Search Results

The *Continuing Grant Increments Search Results List Page* (Figure 18) will appear. The search results will display all Award Numbers that meet the options you selected.

Complete the following steps:

1. The list will display:
  - PI name

- Performing Organization
- Annual Progress Report Due Date
- Date of Next Increment Expected
- Annual Progress Report Status
- Increment Amount.

2. Sort any of the categories by clicking on the column title. Click on the award number (circled in Figure 18) to view the Abstract.

Award Number	PI Name	Performing Organization	Annual Progress Report Due Date	Date of Next Increment Expected	Annual Progress Report Status	Increment Amount
0049066	Gille, Sarah	U of Cal SD Scripps Inst	04/01/2004	12/31/2003	NOT Submitted	\$98,902.00

Figure 18. Continuing Grant Increments Search Results List

3. The Abstract will appear (Figure 19).

**NSF Award Abstract - #8514743**

**A Handbook on the Methodology of Policy Analysis**

NSF Org PRA  
**Latest Amendment Date** April 14, 1987  
**Award Number** 8514743  
**Award Instrument** Standard Grant  
**Program Manager** OPA OFFICE OF PLANNING AND ASSESSMENT  
 O/D OFFICE OF THE DIRECTOR  
**Start Date** August 1, 1985  
**Expires** June 30, 1988 (Estimated)  
**Expected Total Amount** \$129935 (Estimated)  
**Investigator** Otto A. Davis (Principal Investigator current)  
**Sponsor** Carnegie Mellon University

Figure 19. Abstract

4. Click **Cancel** to return to Figure 18.

## Organizational Permissions Report

The *Organizational Permissions Report* page (Figure 20) appears when the Organizational Permissions Report radio button is selected from the *Organizational Reports Main Screen* (Figure 1). The Organizational Permissions Report is used to view permissions of an institution's users.

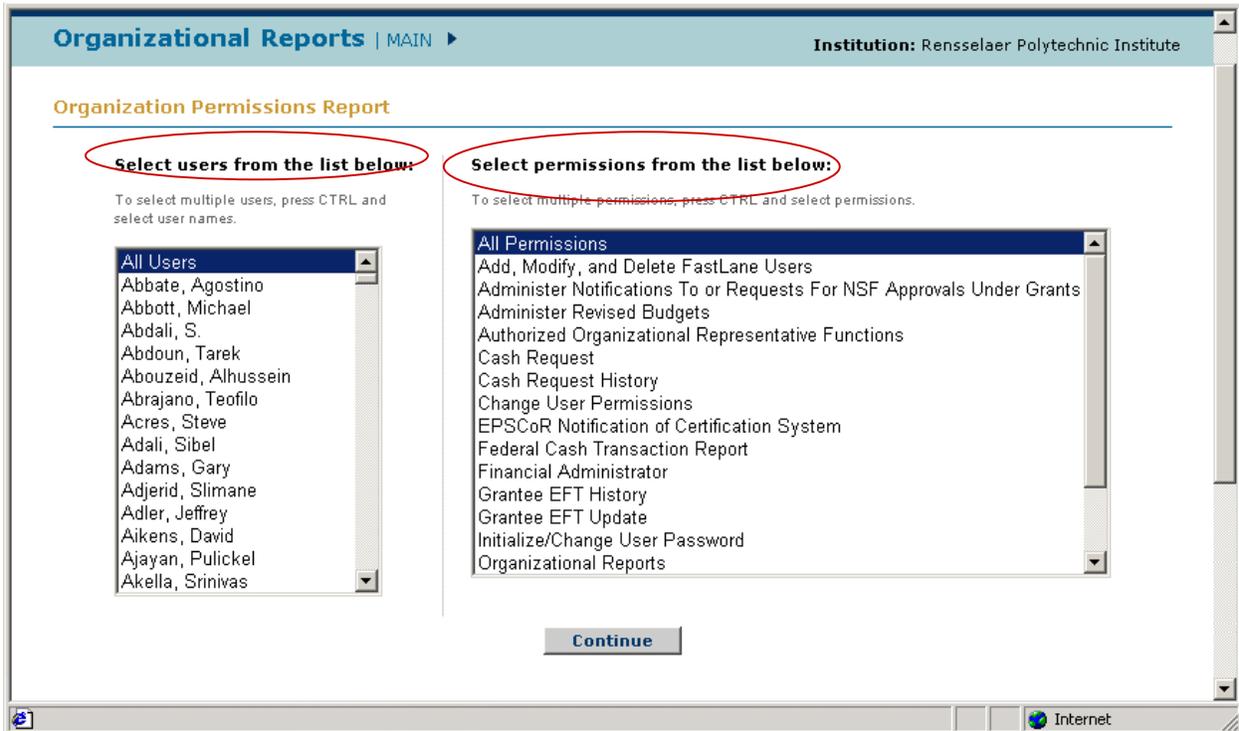


Figure 20. Organization Permissions Report

Complete the following steps:

1. Two different categories are used to conduct an organization permissions search: users and permissions (both are circled in Figure 20).
2. The “select users from the list below” table provides the names of the user, listed alphabetically by last name, and an option to select all users.
  - a. Select a user.
  - b. To select multiple users, press **CTRL** and select user names.
3. The “select permissions from the list below” table provides an alphabetical list of all the permission a user could have, and an option to select all permissions.
  - a. Select permissions.

- b. To select multiple permissions, press **CTRL** and select permissions.
4. When satisfied with the conditions, click **Continue** to perform the search.

## User Permissions Search Results

The *User Permissions Search Results List* Page (Figure 21) will appear listing each person meeting the needs of the project. Complete the following steps:

1. The list displays:
  - User name
  - Permission
  - Phone number
  - E-mail address
2. Click on the column title to sort desired results.
3. Click **Excel** to transfer the data into an Excel Spreadsheet.
4. Click **Cancel** to return to Figure 20.

Organizational Reports | MAIN ▶ Institution: Rensselaer Polytechnic Institute

### User Permissions Search Results

Sort results by clicking column titles.

124 Records found, displaying 1 to 10 [[< Previous 10](#)] [1](#), [2](#), [3](#), [4](#), [5](#), [6](#), [7](#), [8](#), [9](#), [10](#) [[Next 10 >](#)]

User	Permission	Phone	E-mail
abbate,agostino	Financial Administrator	528-266-5367	abbate@ecse.rpi.edu
abrajano,teofilo	Add, Modify, and Delete FastLane Users	518-276-6036	abrajt@rpi.edu
abrajano,teofilo	Administer Notifications To or Requests For NSF Approvals Under Grants	518-276-6036	abrajt@rpi.edu
abrajano,teofilo	Administer Revised Budgets	518-276-6036	abrajt@rpi.edu
abrajano,teofilo	Change User Permissions	518-276-6036	abrajt@rpi.edu
abrajano,teofilo	Initialize/Change User Password	518-276-6036	abrajt@rpi.edu
abrajano,teofilo	Organizational Reports	518-276-6036	abrajt@rpi.edu
abrajano,teofilo	Review/Revise Organizational Information	518-276-6036	abrajt@rpi.edu
abrajano,teofilo	Submit Proposals/Supplements/Updates/Withdrawals to NSF	518-276-6036	abrajt@rpi.edu
abrajano,teofilo	View Project Reports	518-276-6036	abrajt@rpi.edu

Transfer Data to: [Excel](#)

[Cancel](#)

Figure 21. User Permission Search Results